IAD Invoice Approval and Delivery (Bundle 176182)
Set Up Guide

Date	Author	Change
2017-04-25		First version
2019-09-13		Updated description of parameter IAD Invoice Form ID

INSTALL BUNDLE

Install the bundle in the new Account

Important: The bundle installation should be done by Customer user with admin responsibility. Alterview should avoid to install bundles in Customer Production accounts.

1. Log in to Customer Account as Administrator
2. Go To Customization -> SuiteBundler -> Search and Install Bundles
3. Enter 176182 in field KEYWORD and click on Search button
4. Click on "IAD Invoice Approval and Delivery"
5. Click on "Install" and answer OK to questions.

SETUP STEPS

Folowing one-time set up steps have to be completed to enable Invoice Approval and Delivery bundle.

Enable Features (Mandatory)

1. Go to Setup > Company > Setup Tasks > Enable Features, and enable the following:
   On the Employees tab, check the box for Approval Routing.
2. On the SuiteCloud tab, check the box for SuiteFlow.
3. Go to Setup > Accounting > Preferences > Accounting Preferences. On the Approval Routing tab, check the box for Invoices.

Choose Form and Folder for PDF Invoices (Mandatory)

1. Go to Setup > Company > General Preferences, "Custom Preferences" Tab.
2. Identify section "IAD Invoice Approval and Delivery"
3. (Optional) In field "IAD INVOICE FORM ID", enter the FORM ID for the Custom Invoice Form associated to the Invoice Template to use for Invoice PDF.
   If no form id is entered, the form associated to the Invoice will be used.
4. (Mandatory) In field "IAD FOLDER FOR INVOICE PDF", enter the Folder ID of the folder in the File Cabinet where Invoice PDF files will be saved.
   Make sure you have access to the chosen folder.